



Streamlining EVV Workflow

Intended Audience: Agency Providers using Sandata EVV System

NOTE: This webinar will begin 5 minutes after the start time.

Developed January 2022

Sound Test



We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

This presentation is intended for agency providers that are using the Sandata Electronic Visit Verification (EVV) system, provided by the state, to record visits.

Agency providers using an alternate vendor for visit capture and management should work with their Alternate EVV system on streamlining workflows for visit capture.

Agenda

- Review Terms and Definitions
- Discuss Auto-verification
 - What is Auto-Verification
 - Why Auto-Verification matters
- Discuss How to Maintain Auto-Verification
 - Set Up Accurate Records
 - Use the Right Tools
 - Look for Trends
 - Address Claims Matching Errors
 - Review EVV for Help
- Questions

Review Terms and Definitions

Review Terms and Definitions

Agency Provider: An entity that provides care to an individual and records services using EVV

Sandata EVV: The online portal used by agency and non-agency providers to manage Sandata EVV visits and records
(<https://evv.sandata.com>)

Review Terms and Definitions

Exception: An indicator of missing or inaccurate information in Sandata EVV

Verified Visit: A visit that does not contain any exceptions

Processed Visit: A visit that does not contain any exceptions, and has been matched with a claim

Review Terms and Definitions

Client: An individual who receives services subject to EVV requirements

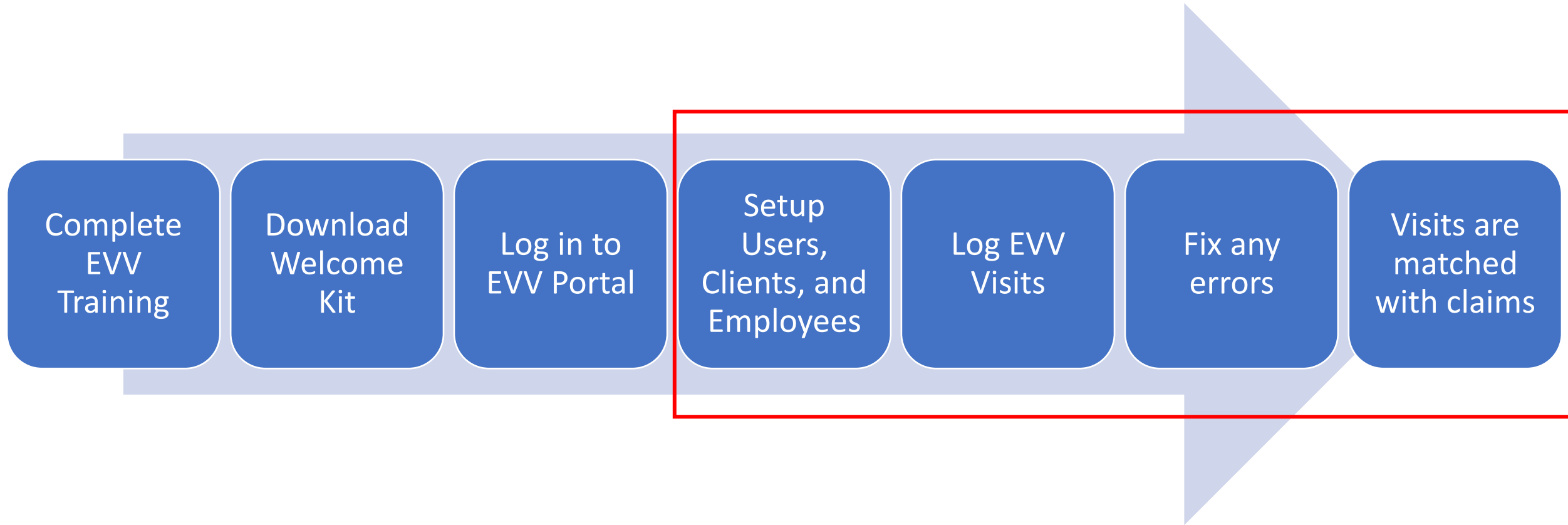
Employee: A person who is employed by an agency provider to provide care to one or more clients (individuals)

Review Terms and Definitions

Sandata Mobile Connect (SMC): Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on a Sandata EVV device

Telephony: Sandata's telephone visit recording option; providers dial an automated line and answer questions to record a visit.

EVV Visit Capture Review



What is Auto-Verification?

What is Auto-Verification?

Auto-verification is when a visit is captured at the point of care with no edits required in Sandata EVV to correct the visit

When a visit is auto-verified, there is no additional work needed from the provider in EVV

Visit Capture Review – What is Required

These data points must be captured for the visit to be verified:

- Direct caregiver of service
 - Username or Employee Santrax ID
- Individual receiving service
 - Client ID or Client Medicaid ID
- Service provided
- Start and end date and time of visit

Visit Capture Review

NOTE: The visit will only be auto-verified if the information on the visit matches records in Sandata

- Example – client record on visit matches the client record in EVV

An auto-verified visit does not always guarantee a matched claim

We will cover claims matching later in this presentation

Visit Capture Review – Visit Maintenance

Visits should be reviewed in the EVV portal by providers to ensure:

- The visit is captured
- The visit has both a call in and a call out
- The visit has all the required pieces of information

Visits with missing or incorrect information may have exceptions

- Visits with exceptions are **not Auto-Verified**
- All exceptions must be resolved for a visit to reach a Verified status

Why Auto-Verification Matters

Why Auto-Verification Matters

- More auto-verified visits = less EVV maintenance time
- Only a Verified visit can be matched with a claim
 - Having more auto-verified visits can increase your claims matching rate with less visit maintenance work required
- Improve overall EVV compliance

Maintain Auto-Verification

Maintain Auto-Verification

Set Up Records in EVV Portal

Have the Right Tools

Look for Trends in Visit Maintenance

Address Claims Matching Errors

Review EVV Help

Set Up Records in EVV Portal

Set Up Records – Clients

The client (individual) record must be completed before the client can be associated with a visit. Please double-check the following fields when creating the client record:

- Client first name
- Client last name
- Client Medicaid ID number
- Payer, program and service
- Service start date
- Payer ID – for individuals with a PIMS ID, and no Medicaid ID yet



Set Up Records – Clients

FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter Middle Initial"/>
CLIENT ID *	MEDICAID ID *	ALTERNATE MEDICAID ID
<input type="text" value="Enter Client ID"/>	<input type="text" value="Enter Medicaid ID"/>	<input type="text" value="Enter Alternate Medicaid"/>

Set Up Records – Clients

Add/Edit Payer

CLIENT NAME

CLIENT ID #

MEDICAID ID #

SUPERVISOR

None

None

None

None

* indicates required field

PAYER *

PROGRAM *

SERVICE *

Select Payer

Select Program

Select Service

CLIENT PAYER ID

FROM DATE * MM/DD/YYYY

TO DATE MM/DD/YYYY

Enter Client Payer Id

Select From Date

Select To Date

CANCEL

ADD

Set Up Records – Employees

The employee record must be completed by the agency before the employee can be associated with a visit. Please double-check the following fields when creating the employee record:

- Employee first name
- Employee last name
- Employee email address
- Employee social security number
- Checking the 'mobile user' box

Set Up Records – Employees

Basic

* indicates required field

FIRST NAME *

Enter First Name

LAST NAME *

Enter Last Name

MIDDLE INITIAL

Enter M

EMPLOYEE ID

Enter Employee ID

EMPLOYEE OTHER ID

Enter Employee Other ID

SOCIAL SECURITY # * 000-00-0000

Enter Social Security #

SANTRAX ID

Enter Santrax ID

EMAIL ADDRESS * NOT CASE SENSITIVE

Enter Email Address

CONFIRMATION EMAIL ADDRESS * NOT CASE SENSITIVE

Enter Confirmation Email Address

Employment

DEPARTMENT

Select Depart ▼

DISCIPLINE

Select Discipli ▼

EMPLOYEE CUSTOM ID

Enter Employee

PAY RATE

Enter Pay Rate

HIRE DATE MM/DD/YYYY

Select Hire Date

TO DATE MM/DD/YYYY

Select To Date

☐ MOBILE USER

Have the Right Tools

Have the Right Tools – Sandata Mobile Connect

Company ID (2- XXXXX)

- Example “STX40001 = 2-40001”

Username

- Email address entered in the employee record

Password

- Emailed directly to the caregiver when the employee record is saved

The Client ID or Client Medicaid ID

- Located in the client record

The service being provided to the client

- Located in the client record

Have the Right Tools – Telephony

Toll free number

- Phone number and a backup number are in the Call Reference Guide, located in the agency Welcome Kit

Employee Santrax ID

- Located in the employee record

The Client ID or Client Medicaid ID

- Located in the client record

The service ID, for the call out process

- Located in the Welcome Kit, or posted [here](#)



Look for Trends

Look for Trends

In Visit Maintenance, you may use these questions to look for trends:

- Are there reoccurring exceptions? If so, what are they?
- Are exceptions occurring most often for the same employee or client visits?
- Could training or other process changes reduce the number of exceptions?

Look for Trends

In Visit Maintenance, check visits regularly to address patterns

Visit Maintenance

Visit Maintenance / Manage Visits

Select a Visit

CREATE CALL

* indicates required field

DATE RANGE * MM/DD/YYYY

12/01/2021

to

12/31/2021

CLIENT

Enter Client

EMPLOYEE

Enter Employee

PAYER

Select Payer

PROGRAM

Select Program

SERVICE

Select Service

CATEGORY

Select Category

VISIT STATUS

Select Visit Status

CLIENT MEDICAID ID

Enter Client Medicaid ID

FILTER VISITS BY

All Visits



Look for Trends

In Visit Maintenance, check visits regularly to address patterns

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Grayson, Richard	Employee, Maria	RN Assessment (T1001)	12/21/2021	09:32 PM	09:34 PM	00:02	09:32 PM	09:34 PM
Grayson, Richard	Employee, Maria	MyCare - HCA (S5125)	12/21/2021	09:27 PM	09:30 PM	00:03	09:27 PM	09:30 PM
Grayson, Richard	Employee, Maria	MyCare - Waiver Choices HCAS (T2025)	12/21/2021	09:16 PM	09:24 PM	00:08	09:16 PM	09:24 PM



Look for Trends – Reoccurring Exceptions

Certain exceptions can appear on every EVV visit until the data source for the exception is resolved, preventing auto-verification:

- Missing/Unauthorized Service
- Unknown Client
- Unknown Employee

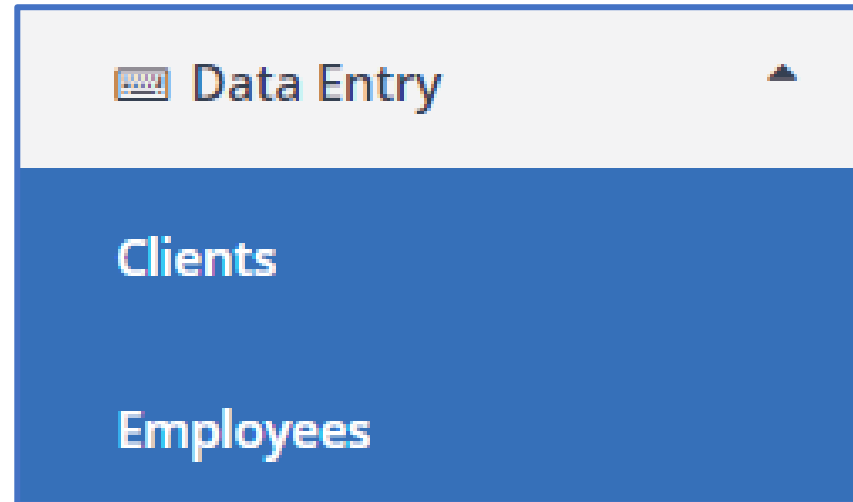
Let's review how to use data entry to reduce these exceptions

Missing/Unauthorized Service

To prevent future missing or unauthorized service exceptions, we need to know what the correct service is on the client record, and how to use that service in visit capture

Missing/Unauthorized Service

On the navigation panel, click **Data Entry**, then click **Clients**



Missing/Unauthorized Service

Search for the client record, then click the pencil icon next to the client's name to open the record details

CLIENT LAST NAME

Smith

CLIENT FIRST NAME

James

CLIENT ID

Enter Client ID

CLIENT MEDICAID ID

Enter Client Medicaid ID

STATUS

Active



Q SEARCH

CLEAR

ROWS PER PAGE: 20

« < 1 > »

Showing 1 to 1 of 1 entries

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
Smith	James	399962	190190190190	Active	 





Missing/Unauthorized Service

Note the payer, program, and service in the client record, or add if the data does not exist, and save the client record if changes were made

Client Payer

[Add New](#)[History](#)

FROM DATE	TO DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
01/13/2022			ODM	SP	PDN (T1000)	 

Showing 1 to 1 of 1 entries

«

<

1

>

»



Missing/Unauthorized Service – Telephony

If using Telephony, match the service to the code on the [Service List](#)

Client Payer

Add New

History

FROM DATE	TO DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
01/13/2022			ODM	SP	SPHH Nsg - LPN (G0300)	 

Showing 1 to 1 of 1 entries


«

<

1

>

»



Ohio Service List

Write your Santrax ID above for easy reference

English toll-free numbers. Please refer to your Call Reference Guide for additional languages.

Service ID	Description	Service ID	Description
101	SPHH Aide (G0156)	616	Passport - LPN (T1003)
105	Physical Therapies (G0151)	636	IO NSG - LPN (T1003)
115	Occupational Therapies (G0152)	656	My Care - LPN (T1003)
125	Speech Language Pathology Therapies (G0153)	707	OHCW HCA (S5125)
202	SPHH Nsg - RN (G0299)	717	Passport HCA (S5125)
303	SPHH Nsg - LPN (G0300)	727	Passport - Waiver Choices HCAS (T2025)



Missing/Unauthorized Service – SMC

If using Sandata Mobile Connect, all services from the client record will display automatically as options to select

22:24

Search

≡

→

SERVICE SELECTION

Monday, January 17, 2022

JAMES SMITH

Please select the service you are providing

PDN (T1000)

SPHH Nsg - LPN (G0300)

START VISIT

Unknown Client

To prevent future unknown client exceptions, we need to verify that the client record exists, and provide the client ID number to the employee to use for visit capture



Unknown Client

When the search results display, note the Client ID number in the middle of the screen

ROWS PER PAGE: 20

« < 1 > »

Showing 1 to 1 of 1 entries

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
Smith	James	399962	190190190190	Active	 

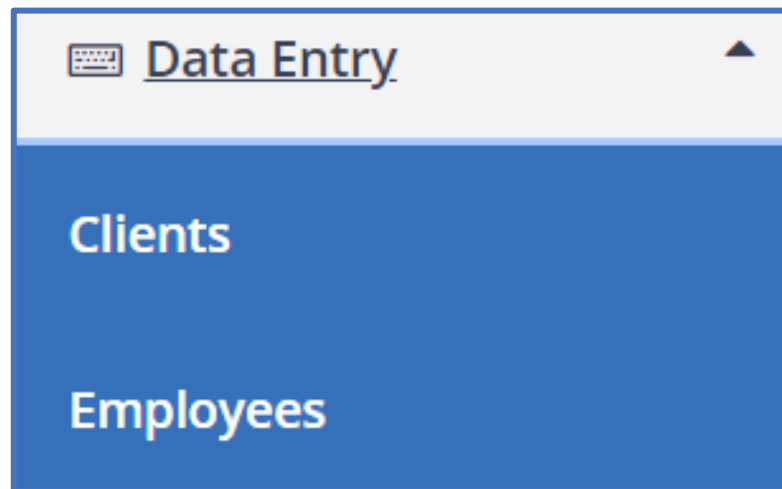
« < 1 > »

Showing 1 to 1 of 1 entries

This is the number that employees will enter when recording future visits for the client

Unknown Client

TIP: If the client record has not been created, click Data Entry > Clients, then click Create Client in the upper right-hand corner of the screen to create a record.



Unknown Client – SMC

If using Sandata Mobile Connect, enter the client ID number or client Medicaid ID number on the search client screen

« < 1 > »				
Last Name	First Name	Client ID	Client Medicaid ID	
Smith	James	399962	190190190190	
« < 1 > »				

10:23
Search

SEARCH CLIENT

Enter Client Identifier

Search

SEARCH CLIENT

Don't have your client's information?

START UNKNOWN VISIT


Unknown Client – Telephony


If using Telephony, enter the client ID number when prompted


« < 1 > »


Last Name	First Name	Client ID
Smith	James	399962


« < 1 > »

6.  Press the (1) key to “Call In”.


 Santrax will say: “Received at (TIME). Please enter first client ID or hang up if done.”

7.  Press the numbers of the client’s ID.

 Santrax will say: “Received at (TIME). Please enter first client ID or hang up if done.”

8.  Hang up.

Sandata



Unknown Employee

To prevent future unknown employee exceptions, we need to verify that the employee record exists, and provide the email address and Santrax ID to the employee

Unknown Employee

Use one or more fields to search for the employee record

Search Employees

CREATE EMPLOYEE

EMPLOYEE LAST NAME	EMPLOYEE FIRST NAME	EMPLOYEE ID
<input type="text" value="Doe"/>	<input type="text" value="John"/>	<input type="text" value="Enter Employee ID"/>
SOCIAL SECURITY # 000-00-0000	STATUS	
<input type="text" value="Enter Social Security #"/>	<input type="text" value="Active"/>	

Q SEARCH

CLEAR

TIP: You may also leave these fields blank and click **Search** to see a list of all employees in your EVV portal





Unknown Employee

When the search results display, click the pencil icon on the right-hand side to open the employee record

ROWS PER PAGE: 20 ▾

Showing 1 to 1 of 1 entries

Last Name	First Name	Employee ID	Social Security #	Status	Actions
Doe	John		***-**-6876	Active	 

Showing 1 to 1 of 1 entries

Unknown Employee

In the employee record, the email address is used for SMC, and the Santrax ID is used for Telephony

Basic

* indicates required field

FIRST NAME *

Janice

LAST NAME *

Brown

MIDDLE INITIAL

Enter M

EMPLOYEE ID

Enter Employee ID

EMPLOYEE OTHER ID

Enter Employee Other ID

SOCIAL SECURITY # * 000-00-0000

SANTRAX ID

000195475

EMAIL ADDRESS * NOT CASE SENSITIVE

JANICEB@MAILINATOR.COM

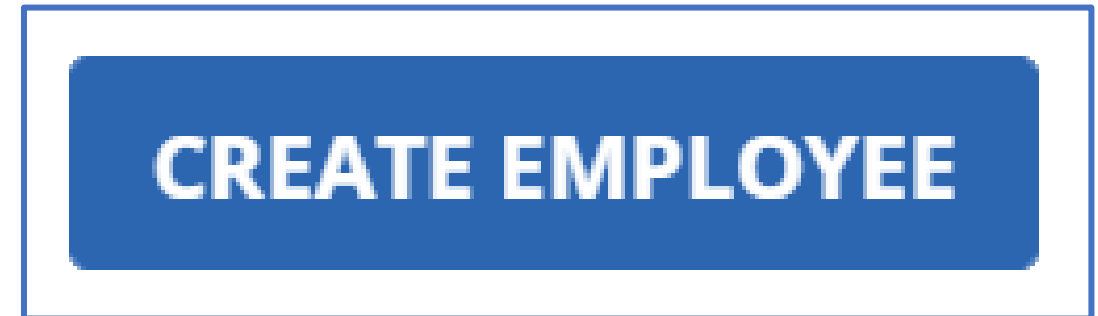
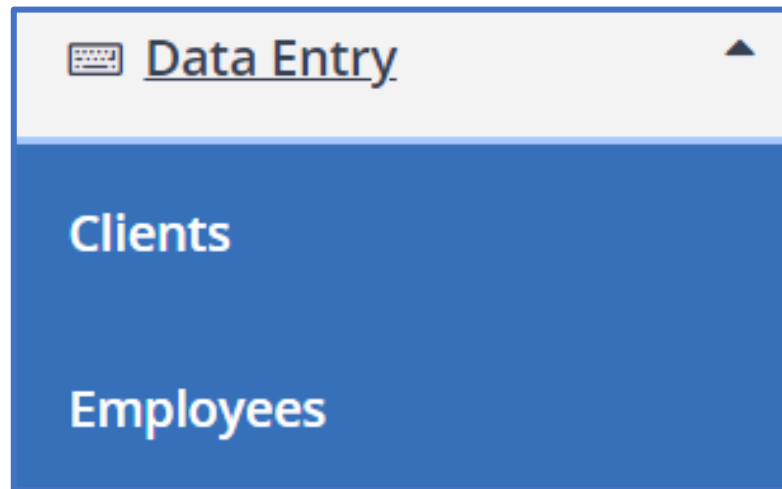
CONFIRMATION EMAIL ADDRESS * NOT CASE SENSITIVE

JANICEB@MAILINATOR.COM



Unknown Employee

NOTE: If the employee record has not been created, click Data Entry > Employees, then click Create Employee in the upper right-hand corner of the screen to create a record.



Unknown Employee – SMC

If using Sandata Mobile Connect, the employee enters their username on the SMC sign in screen

Basic

* indicates required field

FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Janice"/>	<input type="text" value="Brown"/>	<input type="text" value="Enter M"/>
EMPLOYEE ID	EMPLOYEE OTHER ID	
<input type="text" value="Enter Employee ID"/>	<input type="text" value="Enter Employee Other ID"/>	
SOCIAL SECURITY # * 000-00-0000	SANTRAX ID	
<input type="text" value="REDACTED"/>	<input type="text" value="000195475"/>	
EMAIL ADDRESS * NOT CASE SENSITIVE	CONFIRMATION EMAIL ADDRESS * NOT CASE SENSITIVE	
<input type="text" value="JANICEB@MAILINATOR.COM"/>	<input type="text" value="JANICEB@MAILINATOR.COM"/>	

Sandata
MOBILE CONNECT™

COMPANY ID *

USERNAME *

PASSWORD *

denotes required field

Unknown Employee – Telephony

If using Telephony, enter the client ID number when prompted

Basic






* indicates required field

FIRST NAME *	LAST NAME *	MIDDLE NAME *
<input type="text" value="Janice"/>	<input type="text" value="Brown"/>	<input type="text" value="En"/>

EMPLOYEE ID	EMPLOYEE OTHER ID
<input type="text" value="Enter Employee ID"/>	<input type="text" value="Enter Employee Other ID"/>

SOCIAL SECURITY # * 000-00-0000	SANTRAX ID
<input type="text" value="556-56-5566"/>	<input type="text" value="000195475"/>

EMAIL ADDRESS * NOT CASE SENSITIVE	CONFIRMATION EMAIL ADDRESS * NOT CASE SENSITIVE
<input type="text" value="JANICEB@MAILINATOR.COM"/>	<input type="text" value="JANICEB@MAILINATOR.COM"/>

-  **Dial any of the toll-free numbers assigned to your agency.**
If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.
 Santrax will say: **"Welcome, please enter your Santrax ID."**
-  **Press the numbers of your Santrax ID on the touch tone phone.**
 Santrax will say: **"You entered (SANTRAX ID). Press (1) for Yes, (2) for No."**
-  **Press (1) to confirm your Santrax ID or press (2) to retry.**

Address Claims Matching Errors

EVV Claims Matching Process



Address Claims Matching Errors – Examples

Exceptions

- The visit is in Incomplete status and needs errors fixed

Timing

- A claim is sent to payor before a visit is in a Verified status

No Visit Recorded

- A claim is sent to payor before the provider logs a matching visit
- For example, if a caregiver forgets to log a visit, then bills for that visit

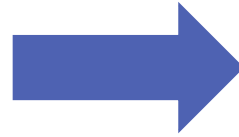
Incorrect Information

- A visit is logged with a service that does not match the claim



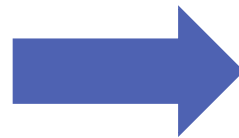
Address Claims Matching Errors – How to Fix

There is no visit in EVV for the service date on the claim



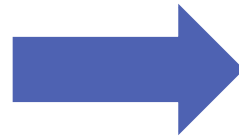
Fix the date of service on the claim or use the Create Call button in Visit Maintenance to create the visit

There are exceptions on the visit in EVV (visit status is incomplete)



Fix exceptions on the Visit Details screen in visit maintenance

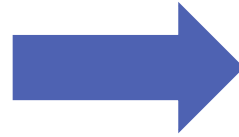
The Medicaid ID entered in the EVV system for the individual does not match the claim



Fix the Medicaid ID number on the claim, or fix the Medicaid ID number on the client record

Address Claims Matching Errors – How to Fix

The date of service on the claim does not match the date on the visit



Fix the date on the claim or visit to match the correct date of service

The service code billed on the claim does not match the service on the visit



Fix the procedure code on the claim, or fix the service code on the visit and/or client record to match the correct service provided

The billed units are less than or equal to what the visit shows in EVV



Fix the units on the claim or edit the call times on the visit to match the times when the visit happened



Review EVV Help

Review EVV Help

Agency Provider Resources

- Agency EVV Training Manual
<https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Agency-Guide.pdf>
- Agency EVV Video Library
<https://fast.wistia.net/embed/channel/vkywg2l6bp>

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505, or email ODMCustomerCareEmail@sandata.com



Review EVV Help

Non-Agency Provider Resources

- Non-Agency EVV Training Manual

[https://medicaid.ohio.gov/static/Providers/EVV/Trainng/P
hase3-Non-Agency-Guide.pdf](https://medicaid.ohio.gov/static/Providers/EVV/Trainng/P
hase3-Non-Agency-Guide.pdf)

Non-Agency EVV Video Library

<https://fast.wistia.net/embed/channel/qkz324kz0p>

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505, or email ODMCustomerCareEmail@sandata.com



Review EVV Help

Provider 1-1 Session with Sandata Trainer and Virtual Office Hours

- <https://go.oncehub.com/ODMEVVHelp>



Questions

Reach Out with Questions

EVV Provider Hotline:

For help with a device or the EVV Portal, call 855-805-3505 or email ODMCustomerCareEmail@sandata.com

Hours of Operation:

- ▶ Mon-Fri, 7am-8pm
- ▶ Sat-Sun, 9am-5pm

ODM EVV Team:

For general EVV questions, email ODMEVV@Sandata.com or leave a voicemail at 614-705-1082

ODM Provider Assistance Hotline:

For help with changing contact information in MITS or claims questions call 800-686-1516

